The Member Account Information Manager

A User's Manual

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Revision History

Version 1.0 -- April 15, 2013

First version. Includes information about the system and proper usage. Includes instructions on installing the Member Account Information Manager, logging in, managing member profiles, and managing class records.

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3.3 The Class List

1 Introduction

1.1 Purpose of the Manual

The Purpose of this document is to provide insight into the use of the accompanying software, the Member Account Information Manager. It will provide detailed steps on how to accomplish various tasks quickly and efficiently. This guide may also serve as a reference for understanding the capabilities of the software.

1.2 Purpose of the Software

This product is a software-based system that is designed to manage membership information from many problem areas. The system focuses on storing information related to contact information, fee payment, membership attendance as well as the specifics of classes offered at the client's institution.

1.3 Operating Environment

The product is designed to run as a standalone desktop application. It should be noted that only one running instance of the program should be used at any given time on the same machine. This is because changes made in one instance of the program will not be immediately reflected in any others that are running, so running multiple instances of the program could have unexpected results.

2 Set up instructions

1. Follow this hyperlink to begin downloading the Member Account Information Manager: http://cois4000.justinbelanger.com/wp-content/uploads/2013/04/MAIM-Setup.zip

2. Extract the installation files from the downloaded .ZIP file to a location of your choosing.
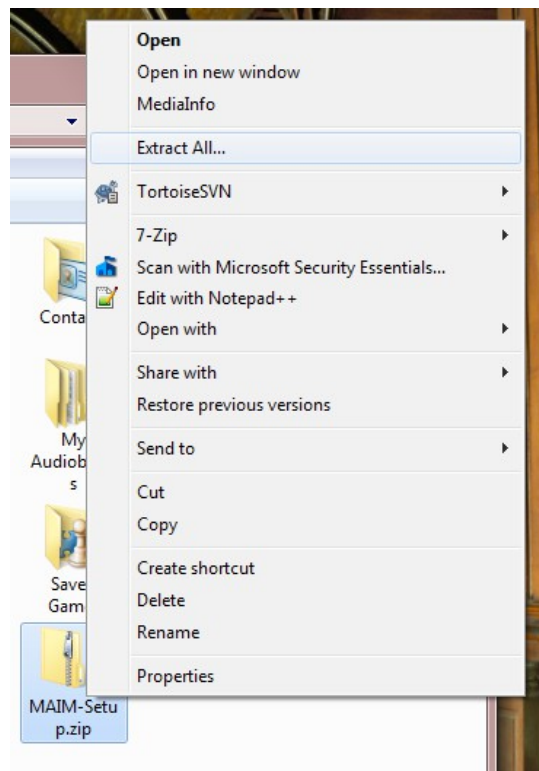
3. Run the setup.exe file in the folder that you extracted the installation files into.
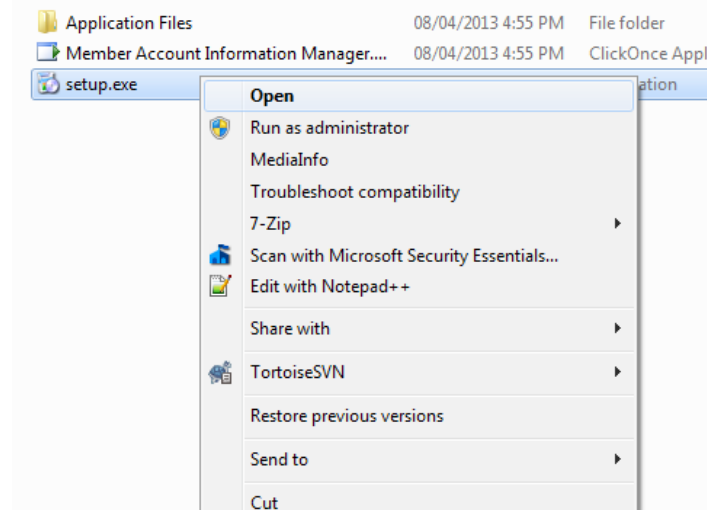
4. Once the software is installed, it will immediately start up for the first time.

5. When you want to use the program in the future, you can find a link to the program in the Start Menu, under the Cherry Computer, Inc folder.
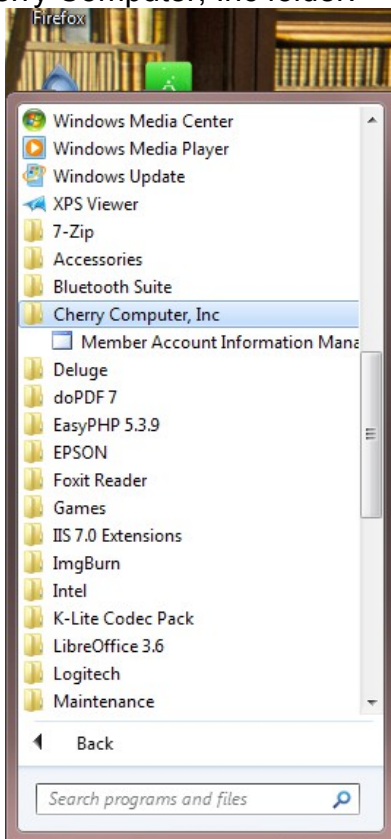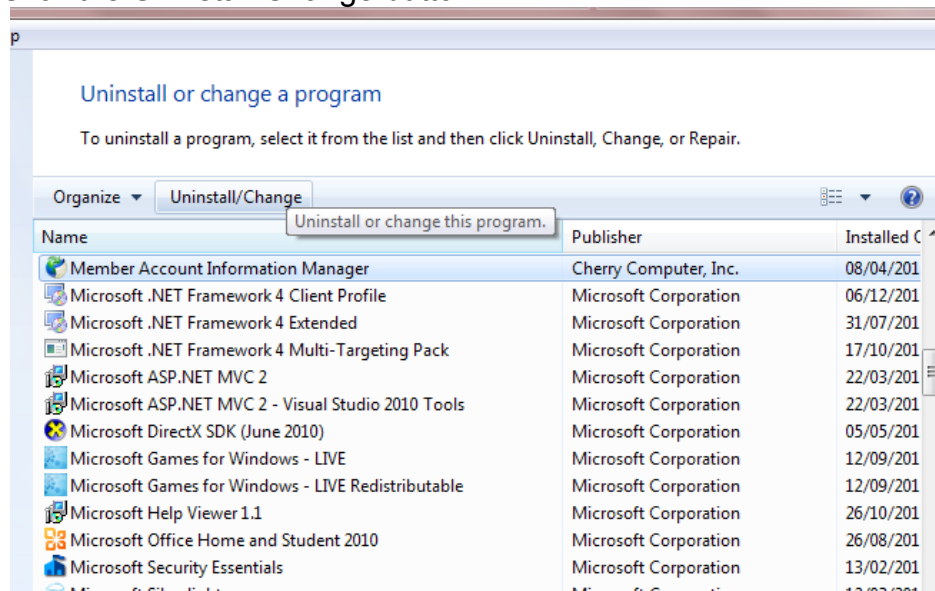
6.a If you wish to uninstall the program, you can open the Start Menu, then click on Control Panel.

6.b Scroll down and click on Programs and Features (in Windows 7; in Windows XP, click on Add/Remove Programs).
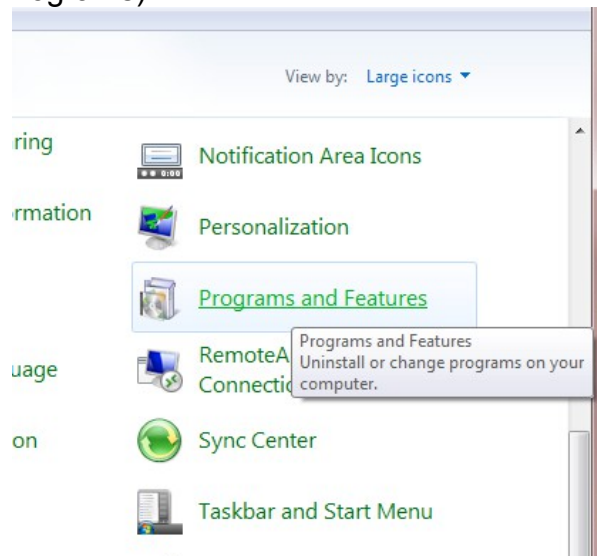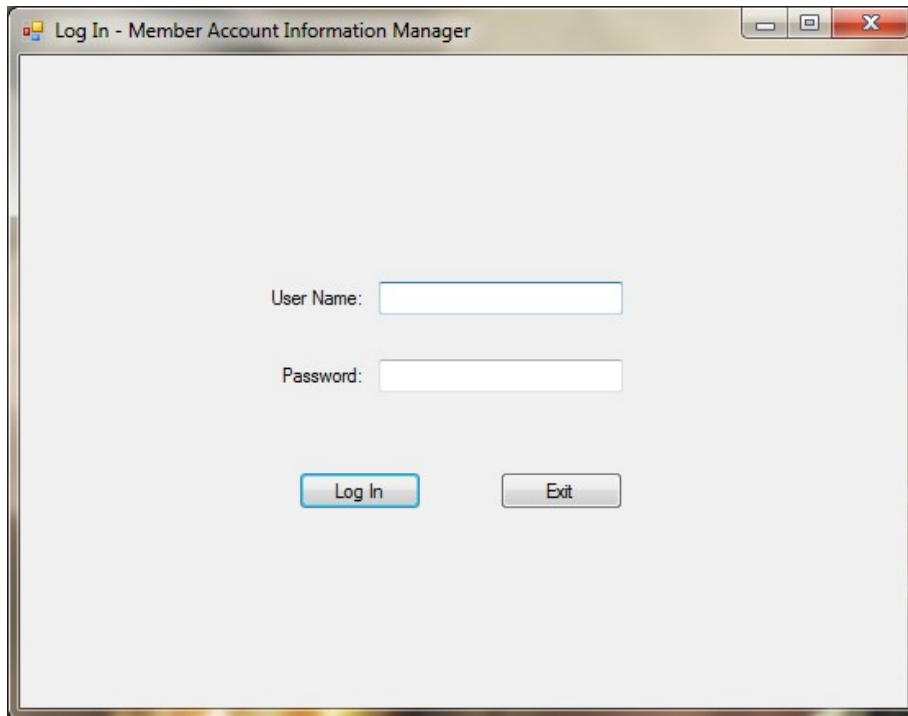
6.c Scroll through the list that appears and select the Member Account Information Manager. Click the Uninstall/Change button.

3 Operating instructions

3.1 Logging in

1. Input your username and password when prompted
2. If authentication is successful, you will be redirected to the Member List screen by default

3.2 The Member List

3.2.1 Adding a Member

1. Adding a member to the system is accomplished by clicking the "Add Member" button while on the Member List screen
2. This will direct you to the Profile page unique to all members
3. Beginning on the "General" tab, information specific to the new member are inserted using the fields provided.
4. once all of the necessary tabs have been filled out, clicking the "Save" button ensures that all information is retained
5. The specific uses and features of certain tabs are elaborated on below and will cover the options that may be unclear
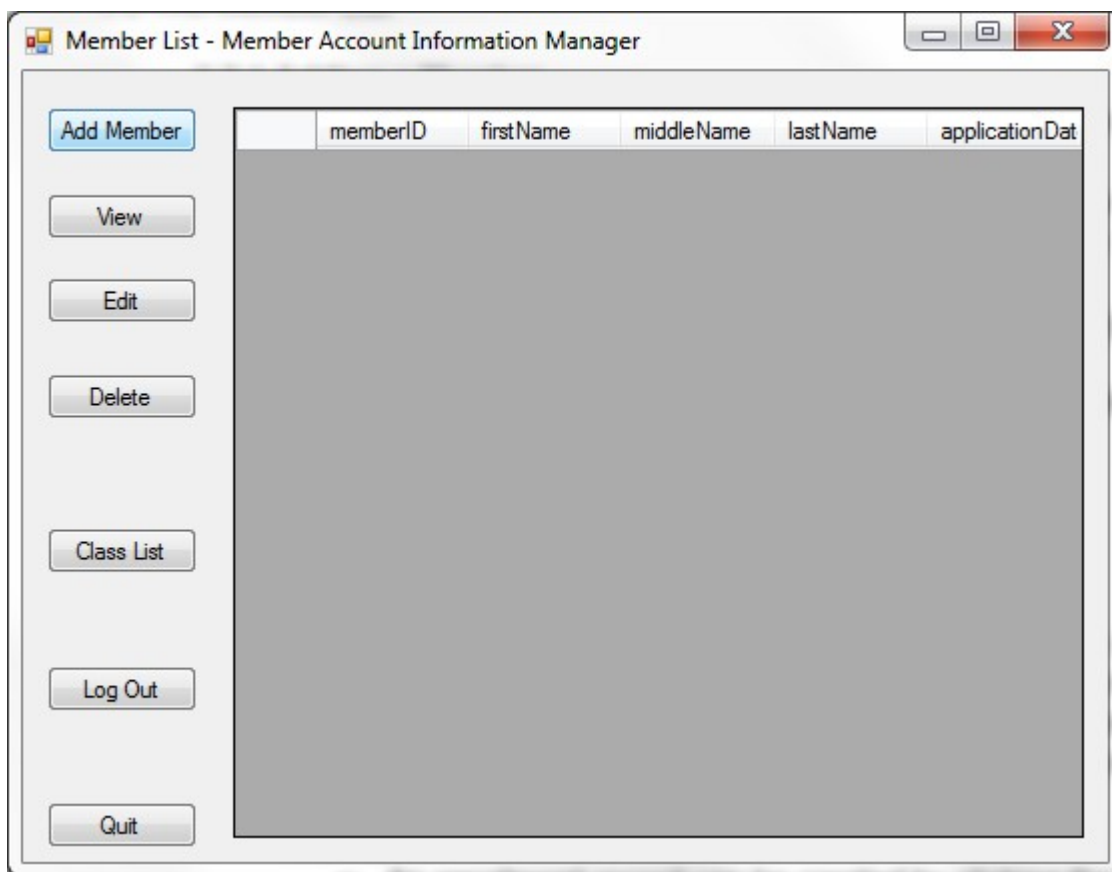
3.2.1.1 The General Tab

1. Clicking the space under the "Photo:" option allows you to upload an image to the profile by browsing the files on your computer
2. the "Application Date" refers to the date that the membership application is being processed and the profile is being created

3.2.1.2 The Contact Information Tab

1. Clicking on the "Contact Information" tab will display fields related to a member's address, phone number(s), and email address
2. For members that are minors at the time of application, information on their parent or guardian can be entered at the bottom of the screen
3. Any information entered here will be saved upon submitting the new member profile

3.2.1.3 The Member Survey Tab

1. Clicking on the "Survey" tab will display a list of questions about a member
2. There are areas next to each question for entering an answer given by the new member
3. Any information entered here will be saved upon submitting the new member profile

Add Member - Member Account Information Manager

| General | Contact Information | Survey | Enrollment | Fees | Attendance | Incidents |

Save

Cancel

Where did you study last?

What style of martial arts did you learn?

How long did you study?

Who was your teacher?

What rank did you attain?

Why did you leave or stop studying?

### 3.2.1.4 The Enrollment Tab

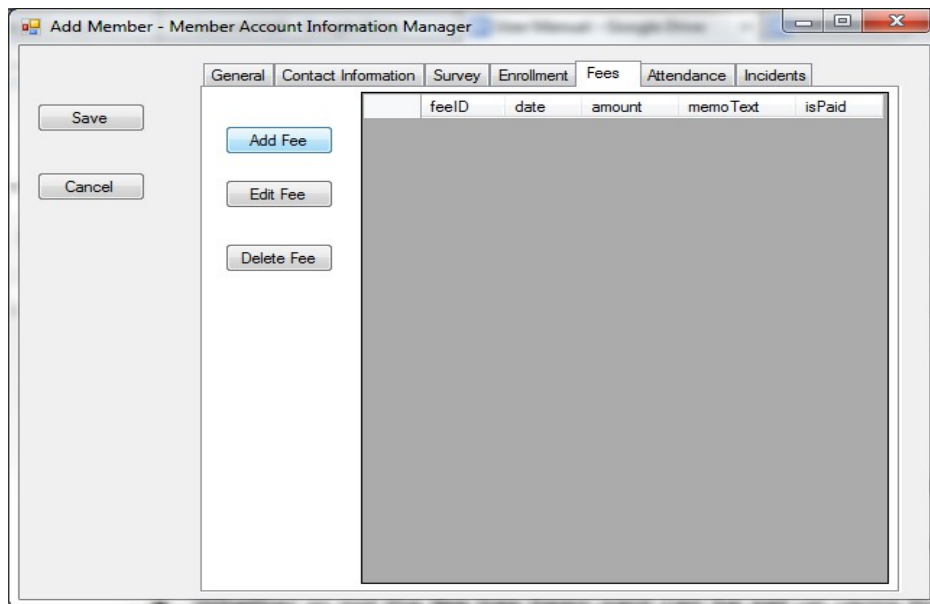1. An enrollment record can be created by clicking the "Add" button
2. This will open a new window that will ask to specify the beginning and end dates of this particular member's enrollment at the club
3. Next, a fee that represents this specific kind of membership will have to be selected and applied to this enrollment record
4. All information added can be saved by clicking the "Save" button
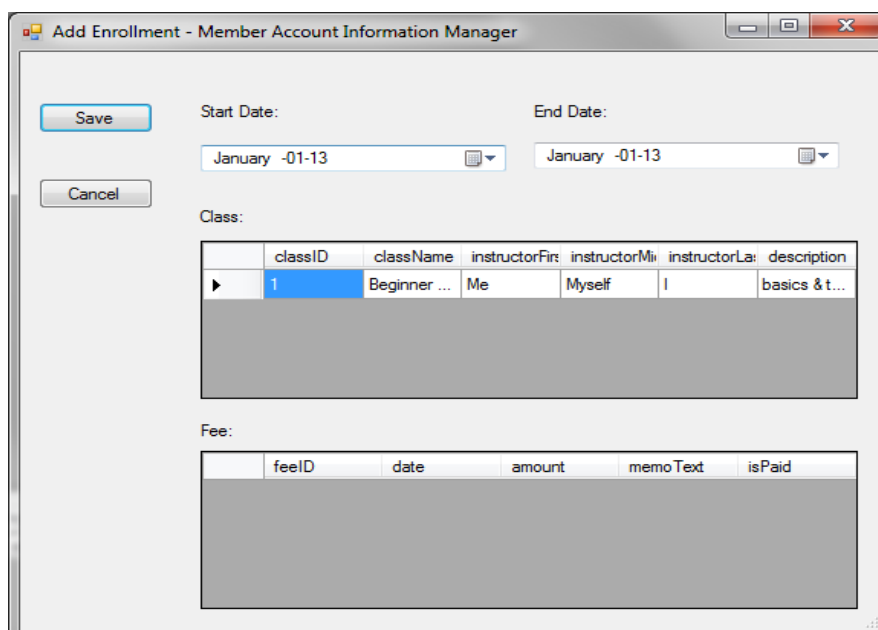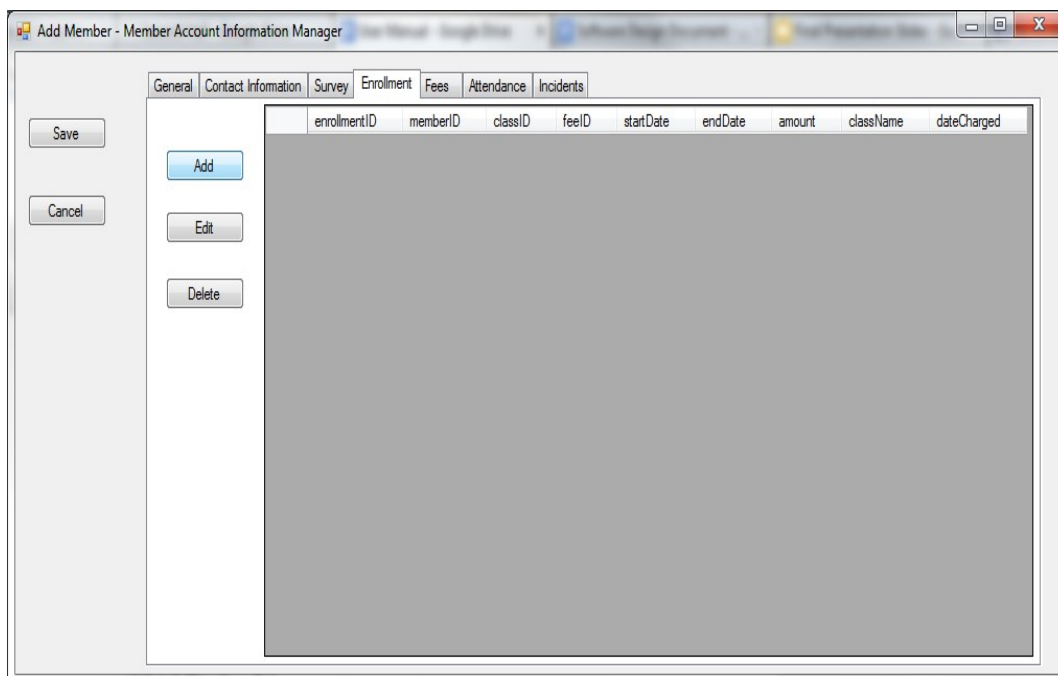
3.2.1.5 The Fee Tab

1. Similar to the Enrollment tab, creating a record on the Fee tab is accomplished by clicking the "Add Fee" button
2. A new window will be opened where the amount can be inserted and a memo can be written up
3. Whether or not the fee has been paid can be set up using the checkbox located in the top right corner of the window
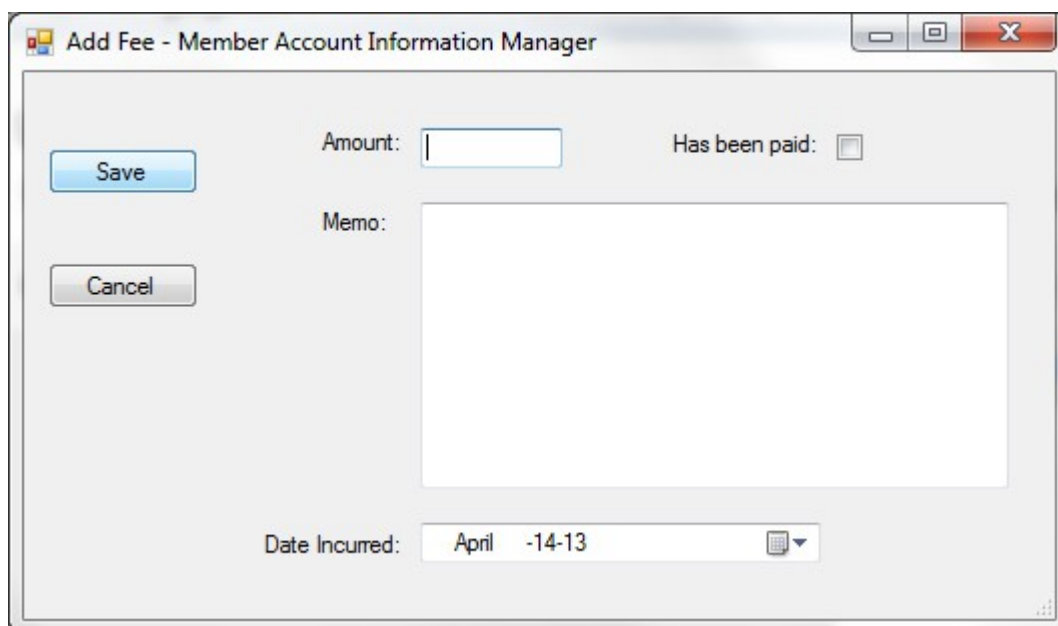
3.2.1.6 The Attendance Tab

1. An attendance record can be created by clicking the "Add" button
2. Whether or not this member has attended the class can be indicated by selecting the appropriate option at the top of the window
3. The attended class can be selected from the list of options as well as the specifics of the date and time
4. This functionality is provided by the selection boxes found in the window
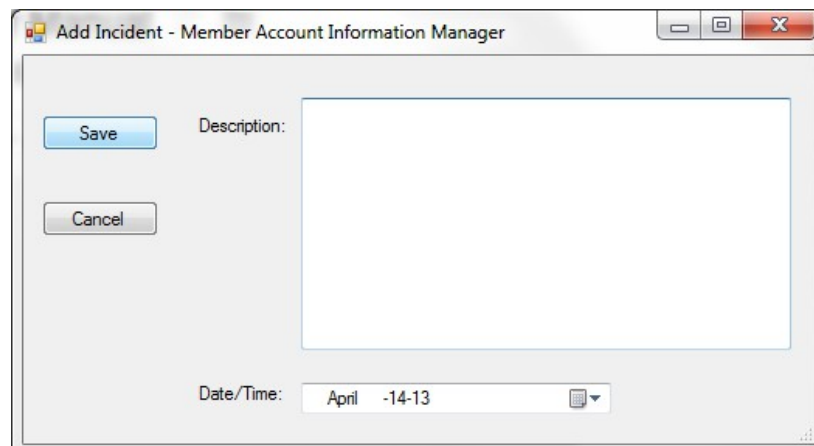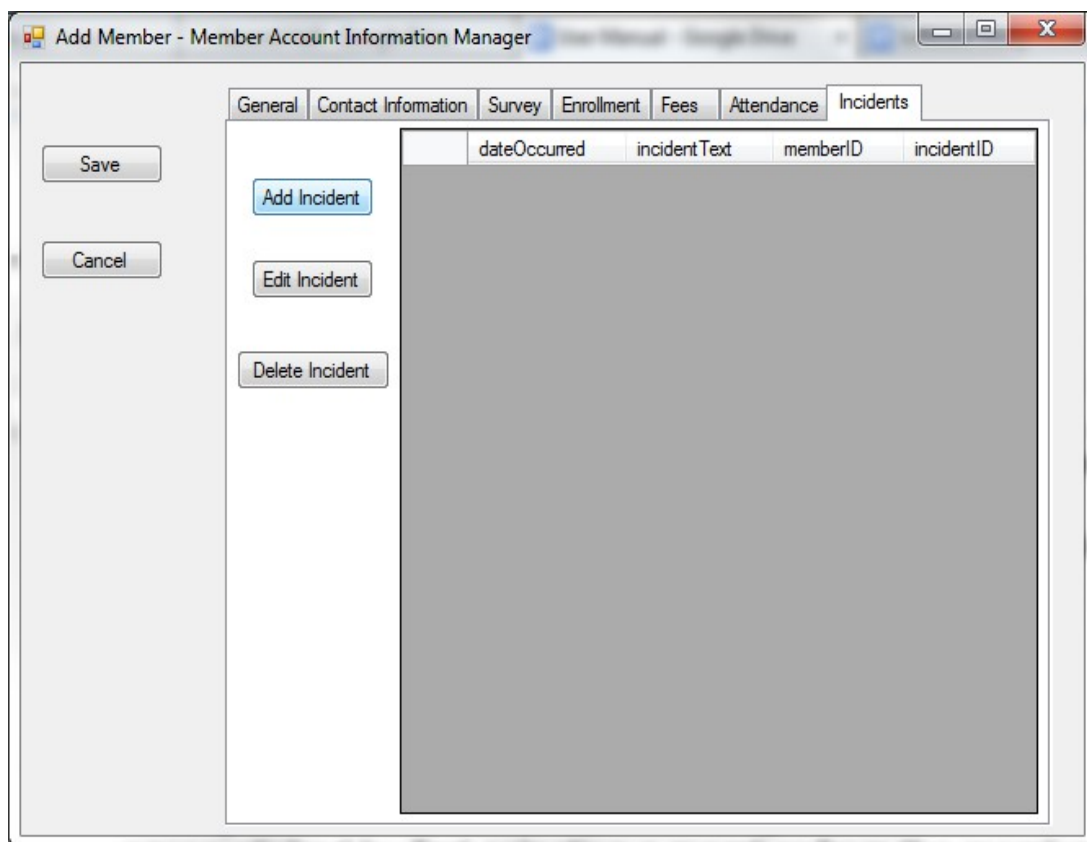
3.2.1.7 The Incidents Tab

1. Specific incidents (whether positive or negative) can be recorded by clicking the "Add Incident" button
2. A memo and the date of the incident can then be saved by clicking the "Save" button

3.2.2 Editing a Member

1. Editing the information on a pre-existing member is accomplished by first selecting a member from the member list by clicking on the member's name
2. Then press the "Edit" button
3. This will open a new window containing all of the previously filled out fields in the member's profile. Changes can be made and these can then be saved by clicking the "Save" button on the respective tabs
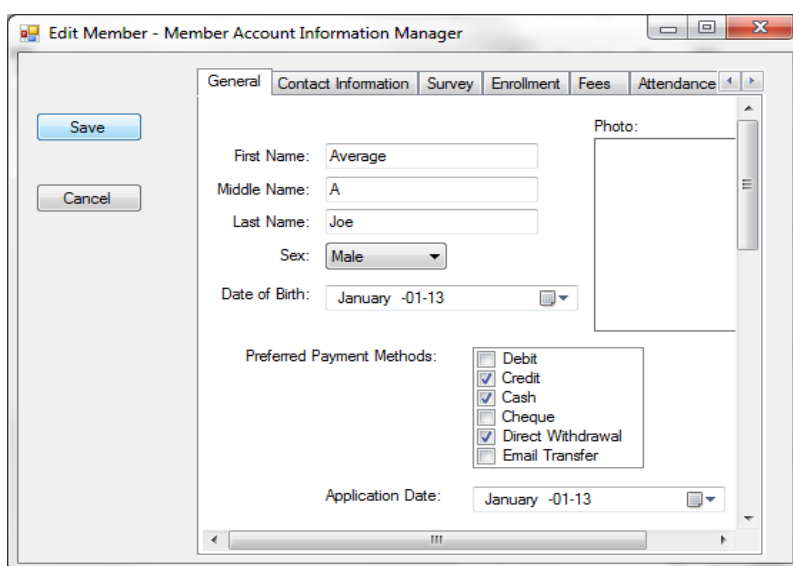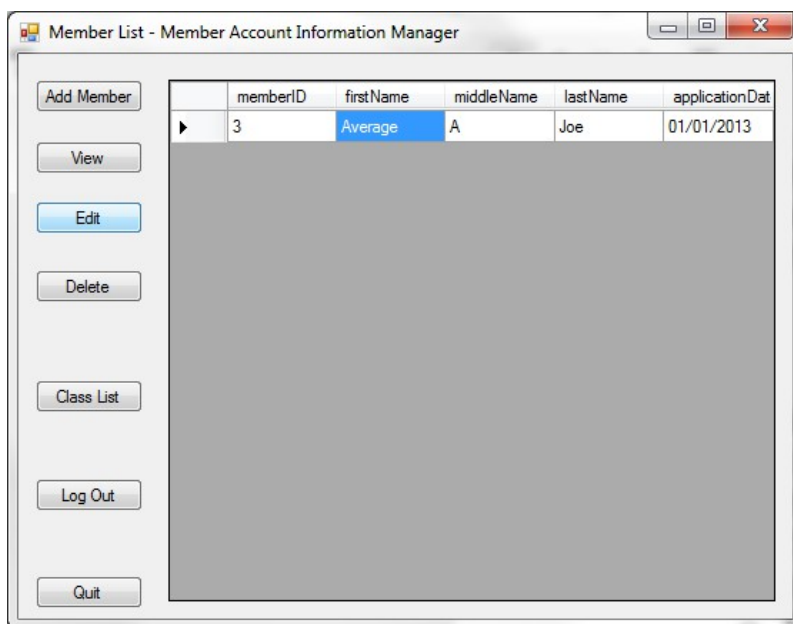
3.2.3 Viewing a Member

1. Information on any member can be viewed by first selecting the desired member and clicking the "View" button
2. This will open a separate window that displays that member's profile and everything on it
3. This information cannot be altered in this view
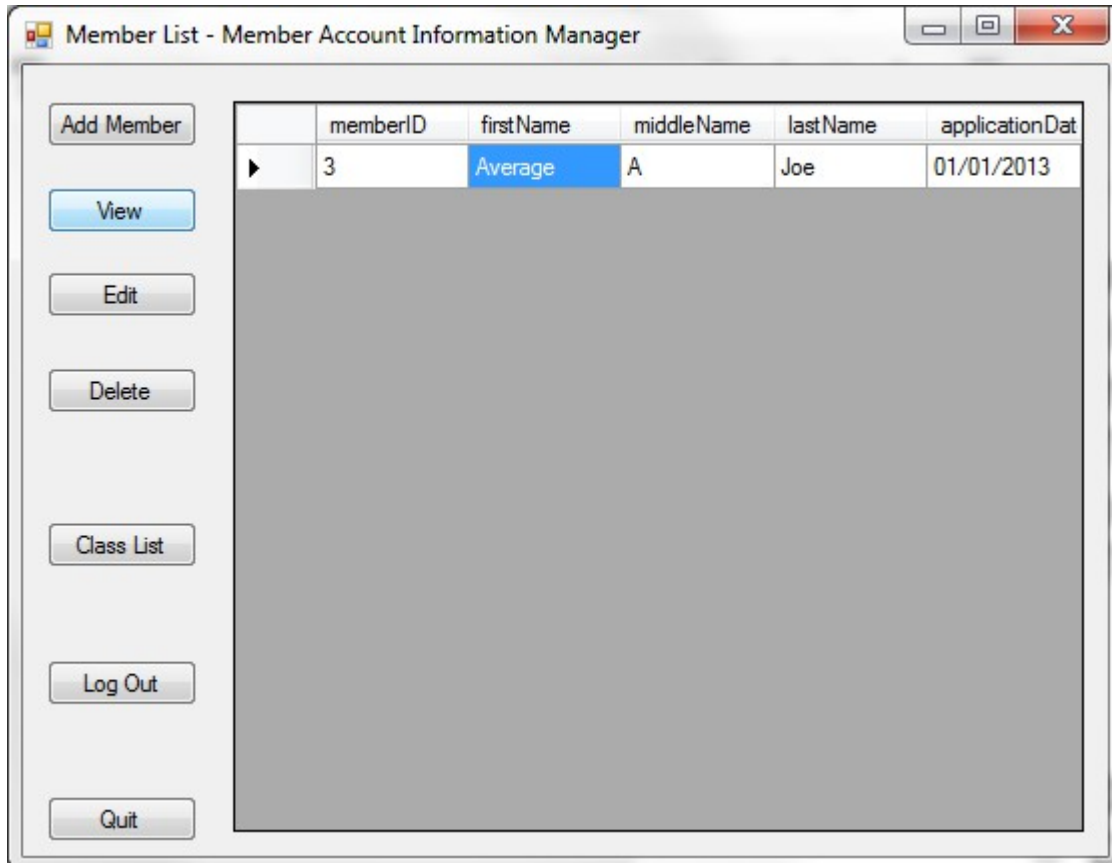
3.2.4 Deleting a Member

1. Deleting a member removes all of the information associated with that member and is done by selecting a member and clicking the "Delete" button
2. There is no way to recover deleted information so be sure that this is what you want to do before going through with it
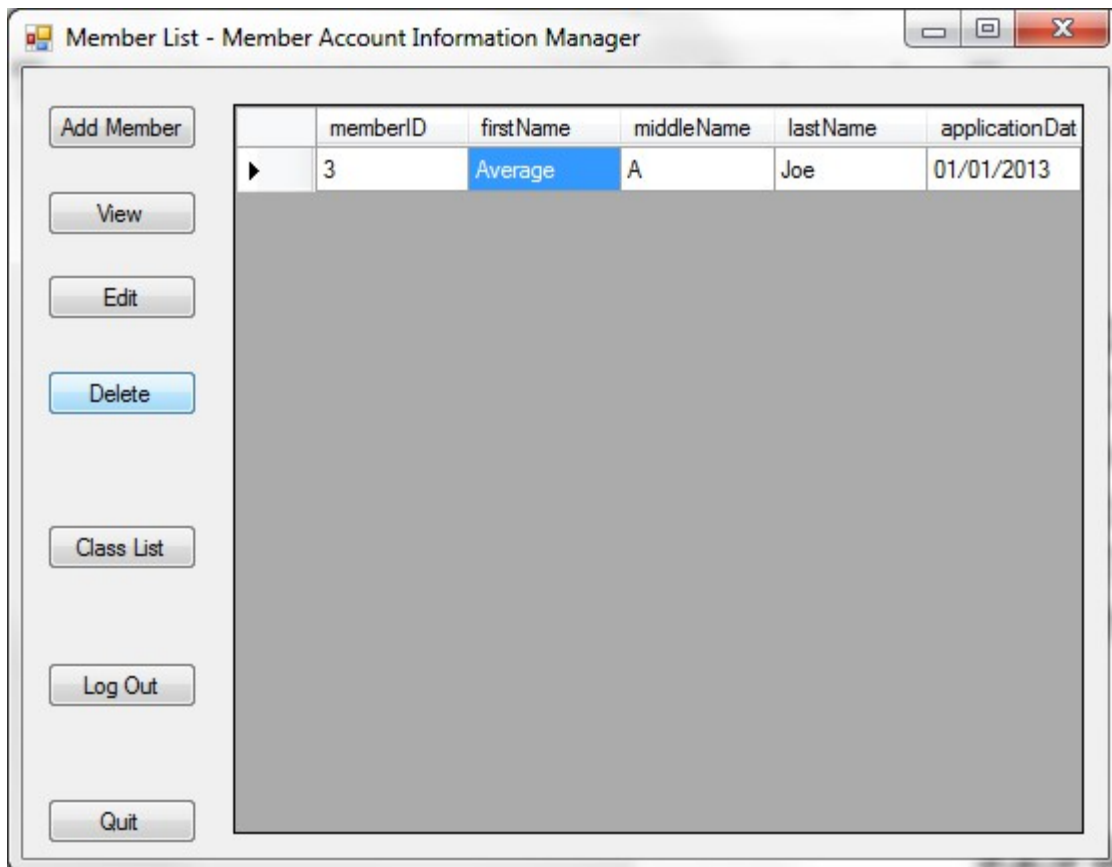
3.2.5 Switching to the Class List

1. Switching to the Class List is done by clicking the "Class List" button found near the bottom left corner of the Member List screen. This gives access to the class profiles as well as the schedules for all of the classes that a profile has been filled out for
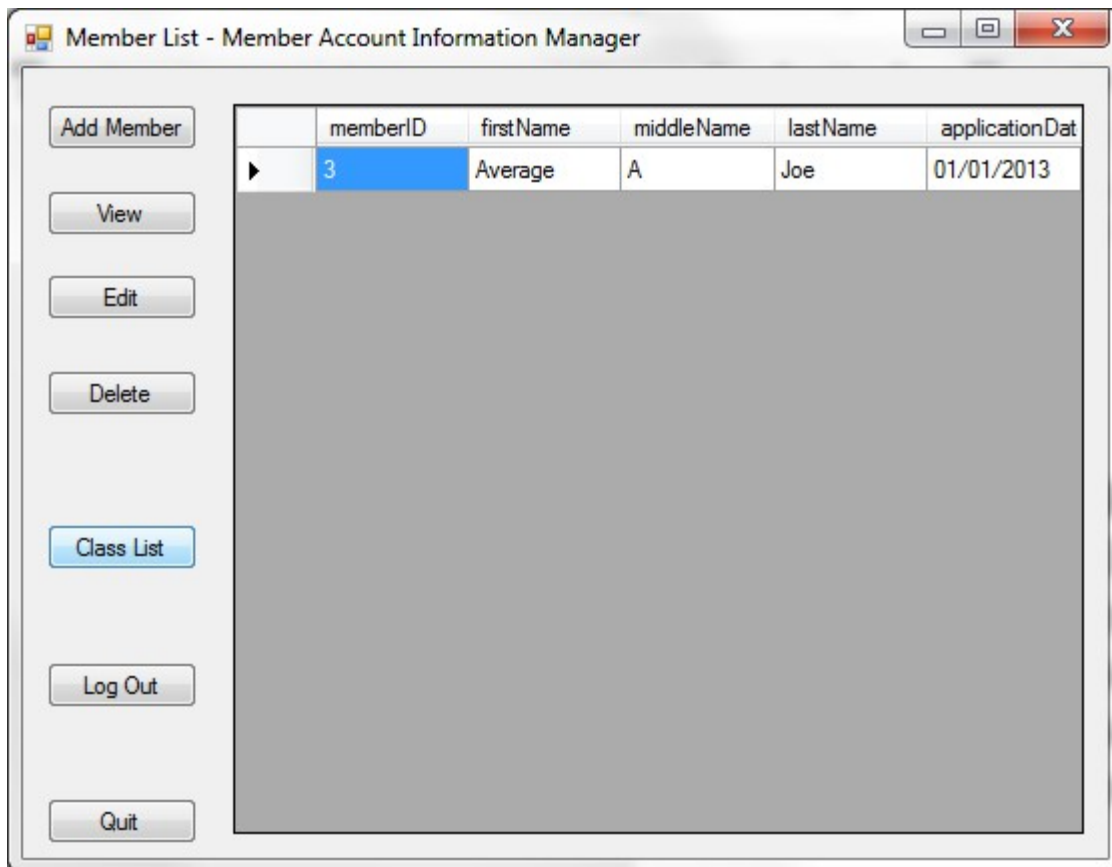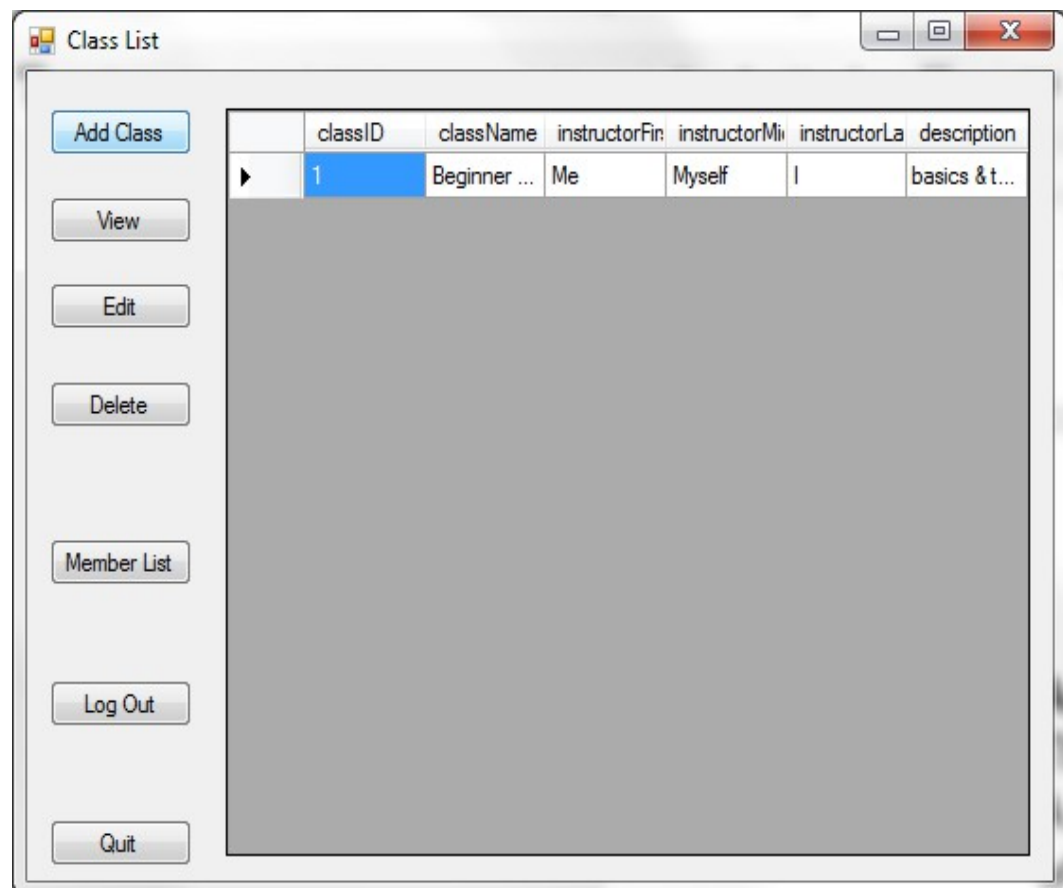
3.3 The Class List

1. The class list is designed to hold all information related to classes at the institution. This section of the program contains sections that can hold the class schedule, details about the class, as well as notes on the instructor teaching the class
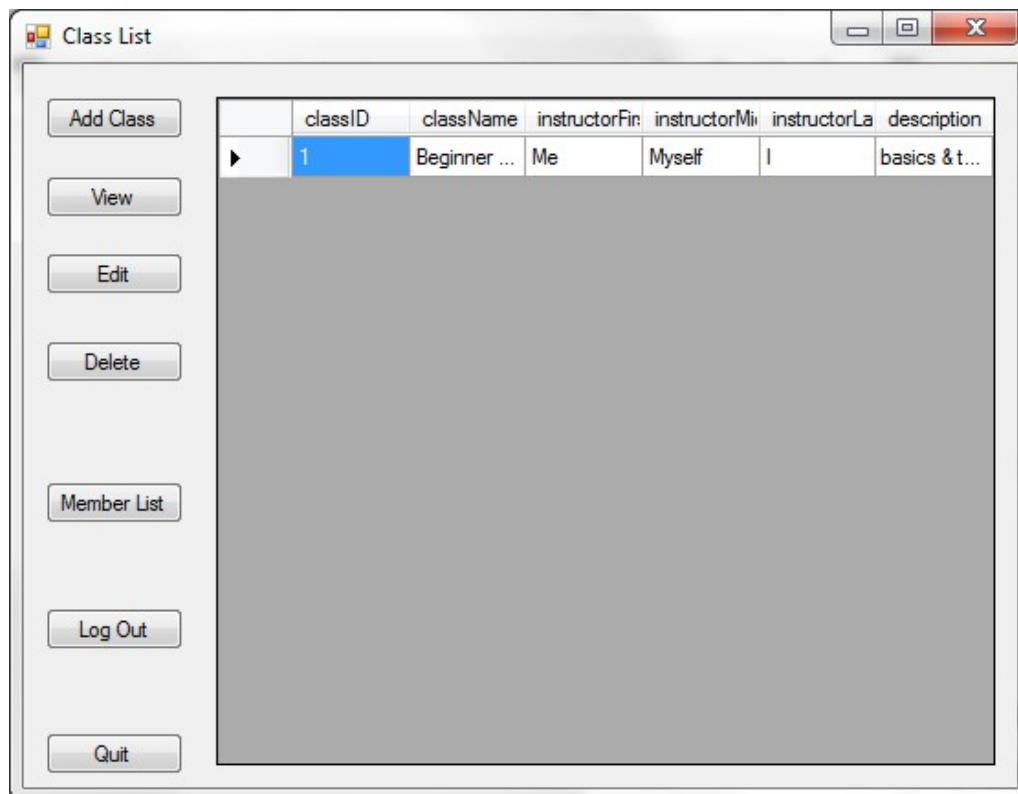
3.3.1 Adding a Class

1. This is accomplished by clicking the "Add Class" button.
2. A new window will be opened that contains the class profile which will hold the all of the relevant information
3. The second tab holds the schedule
   1. selecting a day will allow access to the beginning and end time options as well as the selection box for another day.
   2. Simply fill this out according to the class schedule and click "Save"

3.3.2 Editing a Class

1. Select the class that you wish to edit from the Class List
1. Click the "Edit" button from the Class List
2. This will open a new window that allows the information saved to that class' profile to be altered
3. Click "Save" to keep the changes made
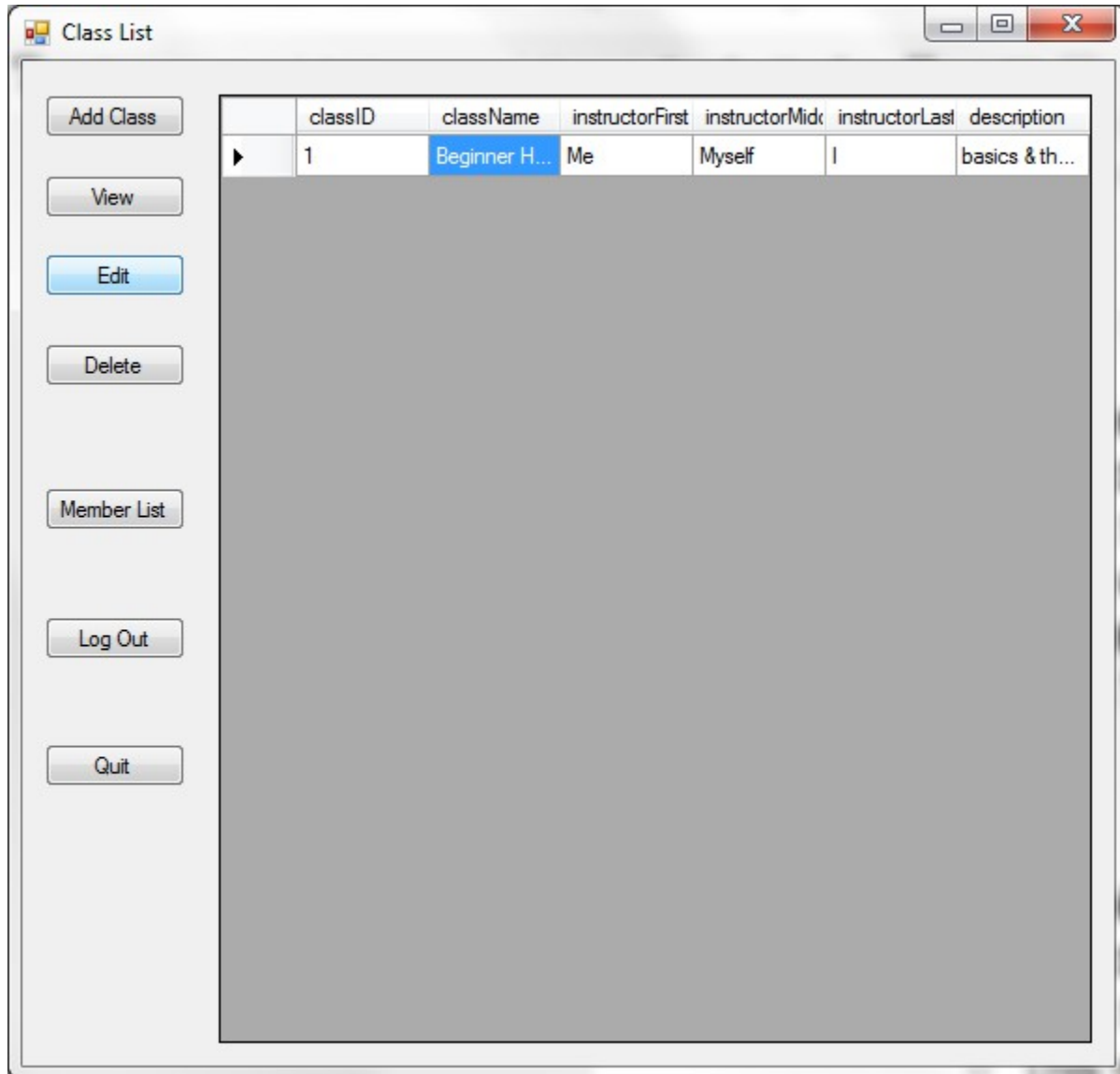
Class

Class   Schedule

Save

Cancel

Class Name: Beginner Hap Ki Do

Instructor

First Name: Me
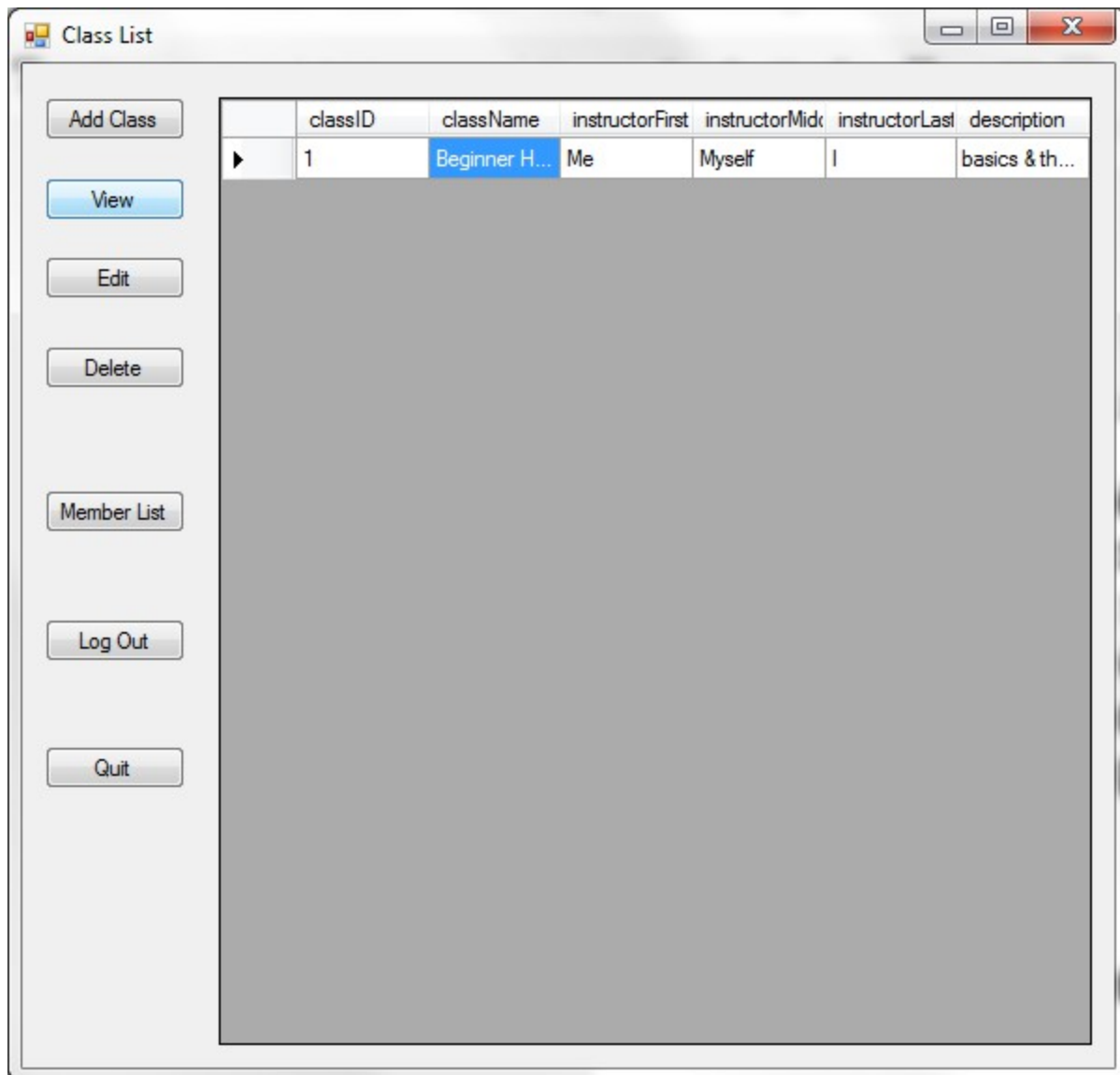
Middle Name: Myself

Last Name: I

Description

basics & theory of Hap Ki Do

3.3.3 Viewing a Class

1. Select the class that you wish to view from the class list
2. Click the "View" button from the Class List screen
3. This will open a new window that allows the information already stored for the selected class to be viewed but not changed in any way

3.3.4 Deleting a Class
1. Select the class that you wish to delete from the Class List
2. Click the "Delete" button from the Class List screen
3. There is no way to recover deleted information so be sure that this is what you want to do before going through with it
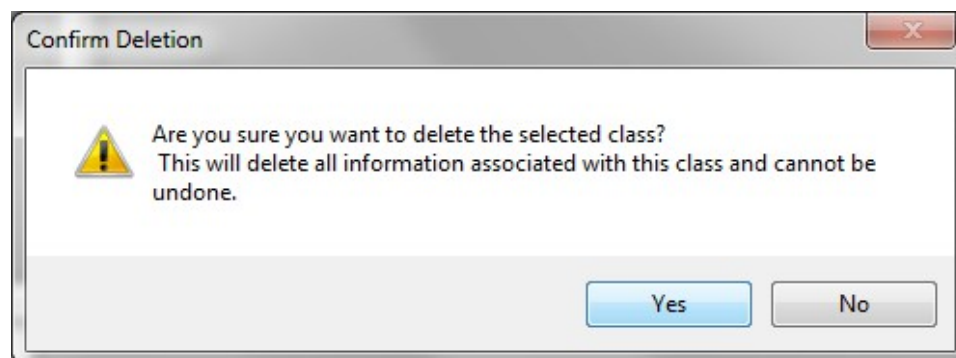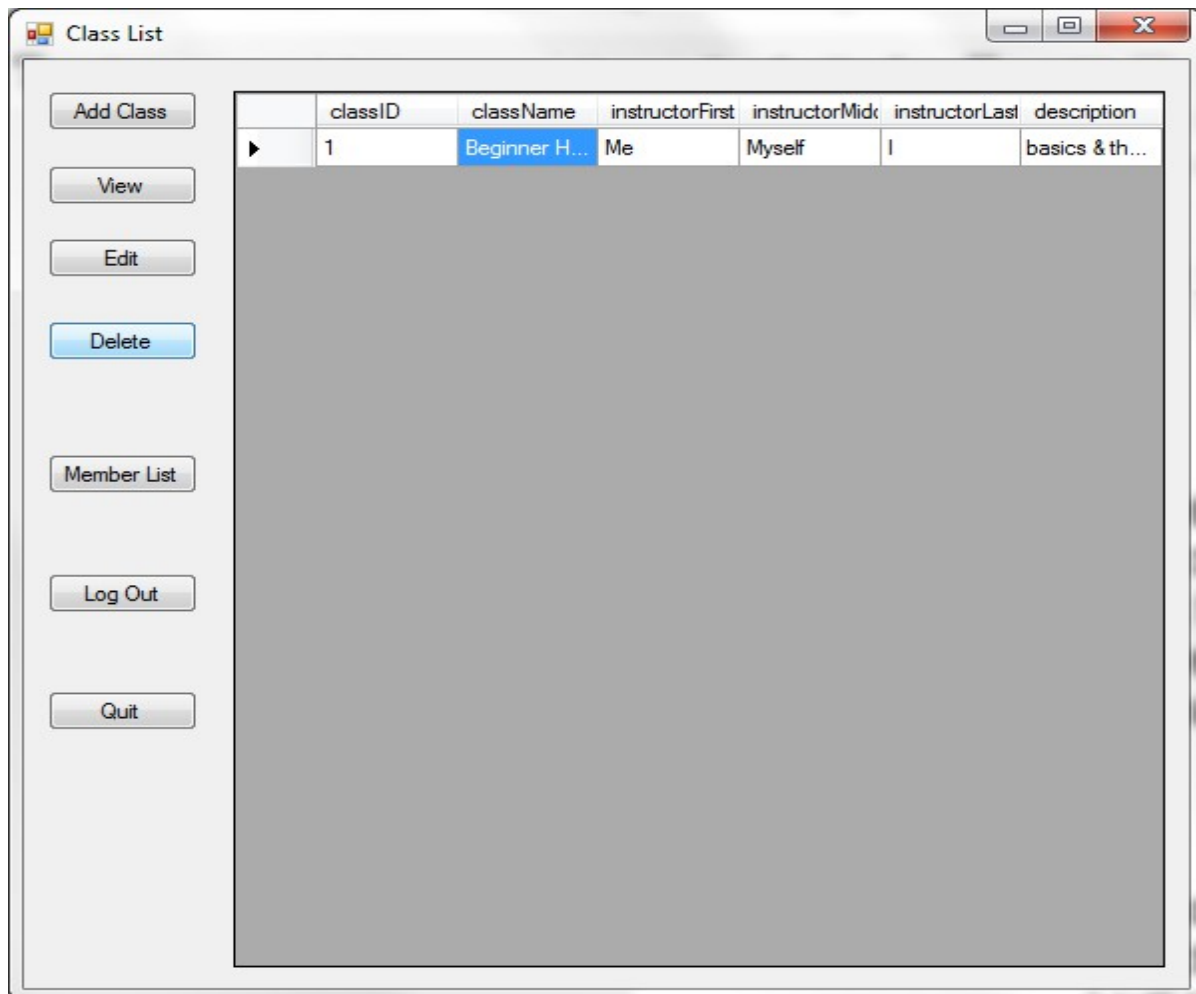
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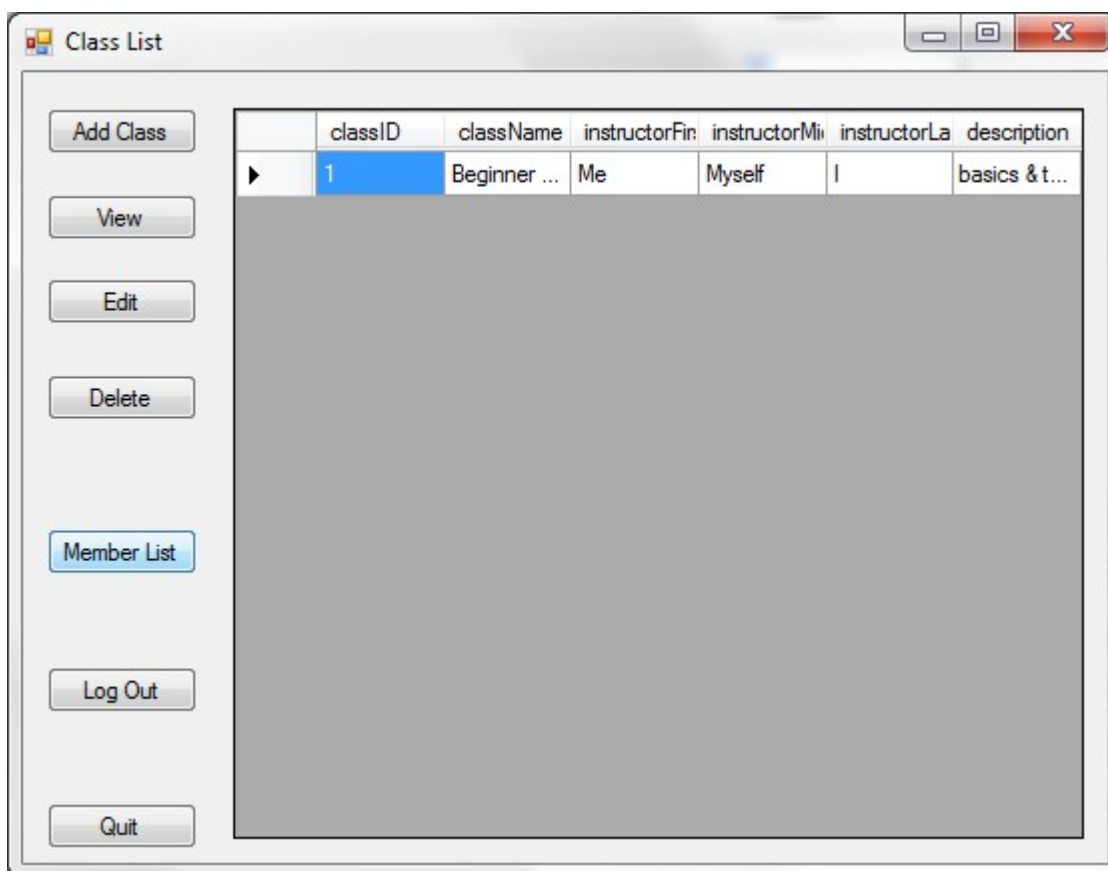
3.4 Logging Out or exiting

1. The "Logout" button is only available on the Member List screen and the Class List screen
2. Ensure that all changes and additions to the pages you are currently on are saved before leaving them to return to the Member List screen or the Class List screen
3. Simply click the "Logout" button and the program will exit
4. The same applies for the "Quit" button